



# **Kansas Department for Aging and Disability Services Community Transition Opportunities (CTO) Instructions for AAA/ADRC Users**

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## **Table of Contents**

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General Information .....	1
Accessing the Application .....	2
Application Navigation Pages .....	5
CTO Report Tab – Finding the Client.....	7
Opening a CTO Worksheet.....	9
LCA Worksheet Process .....	10
LCA Worksheet Tab.....	11
Accepting a CTO Referral / Completing the Local Contact Agency (LCA) Region .....	13
LCA Billing Document.....	15
Worksheet Status.....	16
Closing Applications and Logging Out.....	18

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# General Information

## Overview

CTO (Community Transition Opportunities) is a KDADS web application, created to meet the requirements of MDS 3.0 Section Q. The CTO application is integrated with two other KDADS web applications: KOTA (Kansas Organization Tracking Application) and KAMIS (Kansas Assessment Management Information System.) The AAA/ADRC accesses CTO via the KDADS Web Applications Home Page. The Nursing Facility information comes from KOTA, and KAMIS is used for processing payments to the AAA/ADRC and for KDADS reporting requirements.

The CTO process:

- When a nursing facility resident expresses an interest in transitioning back into the community, the nursing facility creates a CTO worksheet for the resident.
- The worksheet is referred to the Local Contact Agency (LCA) located in that nursing facility's area.
- The LCA accepts the referral, works the case, completes the referral, and sends it to KDADS for billing and any follow-up needed.
- KDADS uses the billing information entered by the LCA to process the payment in KAMIS.
- KDADS records any follow-up information appropriate to the resident's referral.

## System Requirements

- Internet Connection
- Internet Browser:
  - Microsoft Internet Explorer 11 or newer –the only browser that KDADS officially supports for Web Applications
- Other browsers may be used with the understanding that KDADS cannot troubleshoot any issues that may arise using KDADS Web Applications with another browser.

## Contact Persons

Issue	Contact Person
Application Access Application Technical Questions	KDADS Help Desk <b>Phone:</b> (785) 296-4987 (Topeka area) or (800) 432-3535 (statewide) <b>E-Mail:</b> KDADS.helpdesk@ks.gov
Questions about CTO Policies and Guidelines	CTO Program Manager <b>Phone:</b> (785) 296-0385 or (800) 432-3535 <b>E-mail:</b> <a href="mailto:Tyler.Steffes@ks.gov">Tyler.Steffes@ks.gov</a>

# Accessing the Application

## Introduction


Use a web browser to access the KDADS web application site. All KDADS Web Applications are secured and encrypted. These instructions assume the user already has a KDADS Web Applications user account and the necessary security authorizations for the CTO application.

Contact the KDADS Help Desk (785.296.4987 or [KDADS.helpdesk@ks.gov](mailto:KDADS.helpdesk@ks.gov)) if you need assistance obtaining a user account or access to CTO.

## How To

Follow the steps in the table below to login to KDADS Web Applications and launch the CTO application.

Step	Action	Result
1.	Open your internet browser and go to the KDADS Provider Information website. <a href="http://www.kdads.ks.gov/provider-home">http://www.kdads.ks.gov/provider-home</a>	The KDADS Provider Information home page displays.


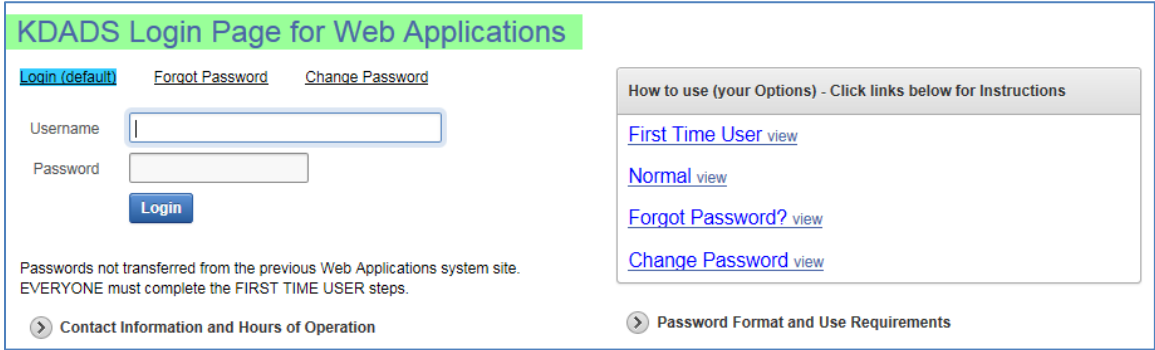


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## Accessing the Application, continued

### How To

Continued

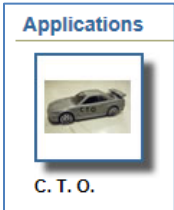
Step	Action	Result
2.	Click on the <b>Web Applications Log In</b> button on the left side of the page or the <b>Web Apps</b> button located on the Provider Information menu bar.	The KDADS Web Application Information page displays.
		
3.	Click on the green <b>Web Applications</b> button.	The KDADS Login Page for Web Applications displays.
		

Continued on next page

## Accessing the Application, continued

### How To

*Continued*

Step	Action	Result
4.	Enter your <b>Username</b> and press the <i>Tab</i> key or click in the <b>Password</b> field.	Insertion point advances to <i>Password</i> field.
5.	Enter your password.	
6.	Click on the <b>Login</b> button or <i>Tab</i> to the <b>Login</b> button and press <i>Enter</i> .	The Web Application Home Page displays.
7.	Click on the <b>C.T.O.</b> button located under the 'Applications' region heading. 	The CTO application launches and the CTO Report tab displays.

## Application Navigation Pages

### Introduction

There are three navigation tabs in the CTO application, and their visibility depends on whether a CTO worksheet is open, or has been viewed.

- CTO Report
- Client Forms (KAMIS #)
- LCA Worksheet (form sequence #)

The **CTO Report** page is a complete listing of all CTO worksheets created by a nursing facility for any of their residents that have been referred to the logged-in user's organization.

The **Client Forms** page displays all worksheets for the customer whose CTO worksheet was most recently accessed. The customer KAMIS number appears on the Client Forms tab.

The **LCA Worksheet** is the actual CTO worksheet form. This is where the form is completed. This tab does not display until a CTO worksheet is opened from the CTO Report page. The worksheet's system-assigned unique sequence number appears on the LCA Worksheet tab.

### CTO Report Page

The screenshot shows the 'Community Transition Opportunities (CTO)' page. At the top right, the 'CTO Report' tab is highlighted with a red box. Below the header, there are radio buttons for 'ALL STATUSES', 'ACTIVE', 'COMPLETED BY LCA', 'COMPLETED BY KDOA/KDADS', 'STOPPED', and 'DISCARDED'. There are also radio buttons for 'ALL DAYS', 'LESS THAN 7', 'LESS THAN 14', and 'OVER 14'. A search bar with a magnifying glass icon and a 'Go' button is present, with a label 'Search the Report Listing' pointing to it. Below the filters, there is a table with the following columns: Kamis Nbr, Last Name, First Name, SSN, Form Date, Form Status, Open, Assigned To, Total Days, and Current Days. The table contains five rows of data. The third row is highlighted in red. At the bottom right, it says '1 - 5 of 5'.

Kamis Nbr	Last Name	First Name	SSN	Form Date	Form Status	Open	Assigned To	Total Days	Current Days
5722178	SMURF	COUSIN	444111951	12/30/2016	COMPLETED BY KDADS	Open	KDADS	2	-
5722178	SMURF	COUSIN	444111951	12/28/2016	COMPLETED BY KDADS	Open	KDADS	1	-
5722161	SMURF	MAMA	444111955	12/01/2016	1ST LCA WORKING CASE	Open	LCA1 (8)	22	22
360974	SMURF	PAPA	444111941	01/03/2017	REFERRED TO 1ST LCA	Open	LCA1 (8)	1	1
360974	SMURF	PAPA	444111941	12/30/2016	COMPLETED BY LCA	Open	KDADS	1	-

### Client Forms Page

The screenshot shows the 'Client Forms' page. At the top right, the 'Client Forms 360974' tab is highlighted with a red box. Below the header, there is a search bar with a magnifying glass icon and a 'Go' button. Below the search bar, there is a table with the following columns: Form Type, Form Date, Form Status, and Open. The table contains two rows of data. A label 'Open/review the worksheet' points to the 'Open' link in the second row. At the bottom right, it says '1 - 2'.

Form Type	Form Date	Form Status	Open
CTO WORKSHEET	01/03/2017	REFERRED TO 1ST LCA	Open
CTO WORKSHEET	12/30/2016	COMPLETED BY LCA	Open

Continued on next page

## Application Navigation Pages, continued

### LCA Worksheet Page

The  
currently  
open  
worksheet

Client Forms 360974

**LCA Worksheet 1506464**

CTO Report

KAMIS #: 360974   Name: SMURF, PAPA   Effective: 10/04/2016   SSN: 444111941   BENI#: 00111111111   CME: 9

**Form Status:**

REFERRED TO 1ST LCA

On Waiting List

Waiting List Start Date

Waiting List Comments

**Nursing Facility Referral**

Form Date 01/03/2017   DOB 04/01/1941   Age 75  
Responsible Party Name JO JO SMURF Phone 785.111.1111

LCA 1 NORTH CENTRAL FLINT HILLS AAA (8)   LCA 1 Referral Date 01/03/2017   Status REFERRED TO 1ST LCA

NF Name COZY HEALTH & REHAB   NF State ID N123456  
Address 1234 MAIN ST PFILSENN, KS 66666   County MARION

NF Admission Date 10/15/2016   Days In NF 80

NF Contact Name JO NF CONTACT   Phone 785.222.2222  
NF Comments

**Local Contact Agency (LCA)**

LCA Organization NORTH CENTRAL FLINT HILLS AAA (8)

LCA Contact Date

LCA Contact Person

**KDADS Follow-Up**

KDADS Follow-Up Date

KDADS Follow-Up Notes TCM

KDADS Follow-Up Notes DRC

KDADS Follow-Up Notes OMB

KDADS Follow-Up Notes Other

Customer Transitioned

Customer Declined

Customer Contacted By TCM

Customer No Action Referral



## CTO Report Tab – Finding the Client

### Introduction

The CTO Report page displays clients' CTO worksheets that have been referred to the logged-in user's organization. This is where you open a client's CTO worksheet to complete it.

Pre-defined filters at the top of the page determine which records are displayed. The search field provides a way to search for a specific record or group of records.

Additional interactive report tools can be used to sort and filter the information to make finding a specific CTO worksheet easier.

Pre-Defined  
Filters

Search Field

Pre-Defined  
Highlights for  
overdue  
worksheets

The screenshot shows the CTO Report interface. At the top right is a tab labeled "CTO Report". Below it are two filter sections. The first section has radio buttons for "ALL STATUSES", "ACTIVE", "COMPLETED BY LCA", "COMPLETED BY KDOA/KDADS", "STOPPED", and "DISCARDED". The second section has radio buttons for "ALL DAYS", "LESS THAN 7", "LESS THAN 14", and "OVER 14". Below the filters is a search field with a magnifying glass icon, a "Go" button, a "Rows" dropdown set to "15", and an "Actions" button. Below the search field is a table with the following columns: Kamis Nbr, Last Name, First Name, SSN, Form Date, Form Status, Open, Assigned To, Total Days, and Current Days. The table contains five rows of data. The row with "5722161" is highlighted in red. At the bottom right of the table is the text "1 - 5 of 5".

Kamis Nbr	Last Name	First Name	SSN	Form Date	Form Status	Open	Assigned To	Total Days	Current Days
5722178	SMURF	COUSIN	444111951	12/30/2016	COMPLETED BY KDADS	Open	KDADS	2	-
5722178	SMURF	COUSIN	444111951	12/28/2016	COMPLETED BY KDADS	Open	KDADS	1	-
5722161	SMURF	MAMA	444111955	12/01/2016	1ST LCA WORKING CASE	Open	LCA1 (8)	22	22
360974	SMURF	PAPA	444111941	01/03/2017	REFERRED TO 1ST LCA	Open	LCA1 (8)	1	1
360974	SMURF	PAPA	444111941	12/30/2016	COMPLETED BY LCA	Open	KDADS	1	-

### Filter/Sort Tools

Click on a column heading to sort and/or filter the information in the report.

This screenshot is similar to the previous one, but with the "Form Status" column heading clicked. A dropdown menu is open, showing a search field and a list of status options: "1ST LCA WORKING CASE", "COMPLETED BY KDADS", "COMPLETED BY LCA", "DISCARDED", "REFERRED TO 1ST LCA", and "STOPPED - BY USER - AAA NOTIFI". The table data is the same as in the previous screenshot, with the row "5722161" highlighted in red. The text "1 - 5 of 5" is at the bottom right.

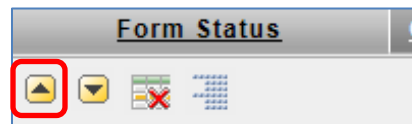
Kamis Nbr	Last Name	First Name	SSN	Form Date	Form Status	Open	Assigned To	Total Days	Current Days
5722178	SMURF	COUSIN	444111951	12/30/2016			KDADS	2	-
5722178	SMURF	COUSIN	444111951	12/28/2016			KDADS	1	-
5722161	SMURF	MAMA	444111955	12/01/2016			LCA1 (8)	22	22
360974	SMURF	PAPA	444111941	01/03/2017			LCA1 (8)	1	1
360974	SMURF	PAPA	444111941	12/30/2016			KDADS	1	-

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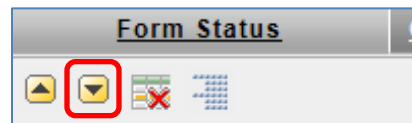
## CTO Report Tab – Finding the Client, continued

### Filter/Sort Tools *continued* Examples

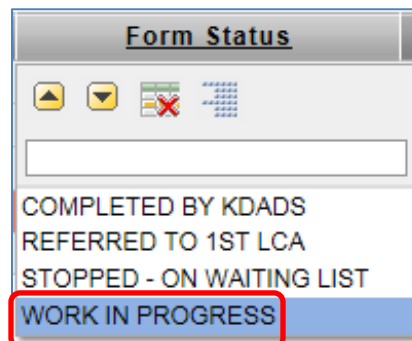
Sort records in Ascending order by this column:



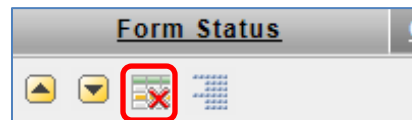
Sort records in Descending order by this column:



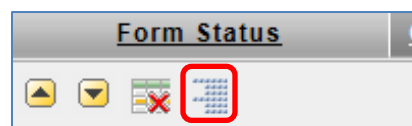
Filter records by the item selected in this column:



Hide this column from the report display:



Create a Control Break using the items in this column:  
(moves the data in the column to a Control Break heading that divides the report into sections by the selected column)



For detailed instructions on how to use the many reporting tools that Interactive Reports provide, refer to the *Interactive Reports User Manual* which can be found on the KDADS Provider Information manuals website at <http://www.kdads.ks.gov/provider-home/manuals>.



## Opening a CTO Worksheet

### Opening an Existing CTO Worksheet

Once the client's CTO worksheet has been found in the CTO Report listing, it can be opened and completed, updated (depending on the Form Status) or reviewed. Follow the steps in the table below to open a worksheet:

Step	Action	Result
1.	Locate the client's worksheet on the <i>CTO Report</i> page.	
2.	Click on the <b>Open</b> link for the selected worksheet.	The worksheet opens in the LCA Worksheet tab.

Kamis Nbr	Last Name	First Name	SSN	Form Date	Form Status	Open	Assigned To	Total Days	Current Days
5722178	SMURF	COUSIN	444111951	12/30/2016	COMPLETED BY KDADS	Open	KDADS	2	-
5722178	SMURF	COUSIN	444111951	12/28/2016	COMPLETED BY KDADS	Open	KDADS	1	-
5722161	SMURF	MAMA	444111955	12/01/2016	1ST LCA WORKING CASE	Open	LCA1 (8)	22	22
360974	SMURF	PAPA	444111941	01/03/2017	REFERRED TO 1ST LCA	Open	LCA1 (8)	1	1
360974	SMURF	PAPA	444111941	12/30/2016	COMPLETED BY LCA	Open	KDADS	1	-

1 - 5 of 5

The Form Status of the worksheet determines whether the worksheet is editable or not. Worksheet statuses are covered later in this manual.

## LCA Worksheet Process

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### The Process

The AAA/ADRC (referred to in CTO as the Local Contact Agency, or LCA for short), will check the CTO Report on a daily basis to see if any new referrals have been made to their organization.

Whenever a worksheet in 'Referred to 1<sup>st</sup> LCA' status appears in the CTO Report, it must be Accepted by the AAA/ADRC (status '1<sup>st</sup> LCA Accepted.') Once the AAA/ADRC has actively started working the CTO referral, the worksheet status should be changed to '1<sup>st</sup> LCA Working Case.'

The AAA/ADRC has seven (7) days to act on the Nursing Facility referral. If the CTO referral's form status has not changed to indicate it is being worked or is completed within seven days of the nursing facility's referral, the worksheet is considered overdue.

When the CTO worksheet has been completed, and billing units entered, the worksheet status is changed to 'Completed by LCA' and the automated billing/payment authorization process in KAMIS is initiated.

Any questions regarding the CTO process or policies should be directed to the CTO Program Manager in the KDADS Commission on Aging. Contact information is located in the *General Information* chapter of this manual.

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# LCA Worksheet Tab

## Introduction

The LCA Worksheet contains the information entered by the nursing facility that referred the resident for CTO. The Nursing Facility Referral information is read-only.

The *Form Status* drop-down list contains the options available to the AAA/ADRC, and the *Local Contact Agency (LCA)* region is available for data entry.

This chapter contains information on the fields that the AAA/ADRC will complete to finish the LCA part of the CTO Worksheet.

Client Forms 360974LCA Worksheet 1506464CTO Report

KAMIS #: 360974 Name: SMURF, PAPA Effective: 10/04/2016 SSN: 444111941 BENI#: 00111111111 CME: 9

Form Status:

Cancel

Apply Changes

REFERRED TO 1ST LCA

1ST LCA ACCEPTED

1ST LCA WORKING CASE

COMPLETED BY LCA

STOPPED - BY USER - AAA NOTIFIED

DISCARDED

On Waiting List

No

Waiting List Start Date

Waiting List Comments

Form Date 01/03/2017

DOB 04/01/1941

Age 75

Responsible Party Name JO JO SMURF

Phone 785.111.1111

LCA 1 NORTH CENTRAL FLINT HILLS AAA (8)

LCA 1 Referral Date 01/03/2017

Status REFERRED TO 1ST LCA

NF Name COZY HEALTH & REHAB

NF State ID N123456

Address 1234 MAIN ST PFILSENN, KS 66666

County MARION

NF Admission Date 10/15/2016

Days In NF 80

NF Contact Name JO NF CONTACT

Phone 785.222.2222

NF Comments

KDADS Follow-Up

KDADS Follow-Up Date

KDADS Follow-Up Notes TCM

KDADS Follow-Up Notes DRC

KDADS Follow-Up Notes OMB

KDADS Follow-Up Notes Other

Customer Transitioned

Customer Declined

Customer Contacted By TCM

Customer No Action Referral

Local Contact Agency (LCA)

LCA Organization NORTH CENTRAL FLINT HILLS AAA (8)

LCA Contact Date

LCA Contact Person

LCA Contact Phone

Customer Chose To Explore Transition Options Yes

Referrals as needed to: Ombudsman ~select~ DRC ~select~ Other ~select~

Date Referred to CM/CME

CM/CME Name

CM/CME Phone

LCA Comments

LCA Billing Document - Maximum 12 Units

Meeting Length In Units

(1 Unit = 15 Minutes)

Coordination & Planning Time In Units

LCA Billing In Units

Continued on next page

## LCA Worksheet Tab, continued

### Form Fields

Refer to the table below for a description of each field in the *Local Contact Agency (LCA)* region.

Fields marked with a red asterisk (\*) are required and must be completed.

Field	Action / Purpose
Form Status	Shows what organization is currently responsible for the worksheet. When the LCA first opens a referred worksheet, the default status will be 'Referred to 1 <sup>st</sup> LCA.'
LCA Organization	Defaults to the AAA/ADRC that covers the county in which the customer's nursing facility is located.
LCA Contact Date	The date the LCA contacted the customer.
LCA Contact Person	The LCA employee that contacted the customer.
LCA Contact Phone	The LCA Contact's phone number.
Customer Chose To Explore Transition Options	Choose the appropriate response (Yes, No, or Undecided)
Referrals as needed to: <ul style="list-style-type: none"><li>• Ombudsman</li><li>• DRC</li><li>• Other</li></ul>	Select Yes, No, or Undecided for each referral. If 'Other' is Yes, there must be an entry in the accompanying text box (maximum 20 characters.)
Date Referred to CM/CME	The date the customer was referred to a Case Manager.
CM/CME Name	The name of the Case Manager.
CM/CME Phone	The Case Manager's phone number.
LCA Comments	Any comments relevant to this referral can be entered here.

# Accepting a CTO Referral / Completing the Local Contact Agency (LCA) Region

## Introduction

Once the LCA accepts a referral, and starts working the case, the *Local Contact Agency (LCA)* region must be completed. If the AAA/ADRC is not going to work the case right away, the form status should still be updated to indicate its acceptance of the case.

Once the case is being worked, the status can be updated at that time. After the referral is complete, the billing information must be completed so the automated payment process can be started when the form status is changed to 'Completed by LCA.'

## How To

Follow the steps in the table below to accept a CTO referral and complete the worksheet.

Step	Action	Result
1.	Locate the CTO referral on the CTO Report listing and click on the <b>Open</b> link.	The CTO worksheet opens in the LCA Worksheet tab.

**CTO Report**

ALL STATUSES ☐ ACTIVE ☐ COMPLETED BY LCA ☐ COMPLETED BY KDOA/KDADS ☐ STOPPED ☐ DISCARDED

ALL DAYS ☐ LESS THAN 7 ☐ LESS THAN 14 ☐ OVER 14

Go Rows: 15 Actions

Kamis Nbr	Last Name	First Name	SSN	Form Date	Form Status	Open	Assigned To	Total Days	Current Days
360974	SMURF	PAPA	444111941	01/03/2017	REFERRED TO 1ST LCA	Open	LCA1 (8)	2	2
5722178	SMURF	COUSIN	444111951	12/30/2016	COMPLETED BY KDADS	Open	KDADS	2	-
360974	SMURF	PAPA	444111941	12/30/2016	COMPLETED BY LCA	Open	KDADS	1	-
5722178	SMURF	COUSIN	444111951	12/28/2016	COMPLETED BY KDADS	Open	KDADS	1	-
5722161	SMURF	MAMA	444111955	12/01/2016	1ST LCA WORKING CASE	Open	LCA1 (8)	23	23

1 - 5 of 5

**LCA Worksheet 1506464**

KAMIS #: 360974 Name: SMURF, PAPA Effective: 10/04/2016 SSN: 444111941 BEN#: 001111111111 CME: 9

**Form Status:**

REFERRED TO 1ST LCA

**Nursing Facility Referral**

\* Form Date 01/03/2017 \* DOB 04/01/1941 Age 75  
Responsible Party Name JO JO SMURF Phone 785.111.1111  
\* LCA 1 NORTH CENTRAL FLINT HILLS AAA (8) LCA 1 Referral Date 01/03/2017 Status REFERRED TO 1ST LCA  
NF Name COZY HEALTH & REHAB NF State ID N123456  
Address 1234 MAIN ST PFILSENN, KS 66666 County MARION  
\* NF Admission Date 10/15/2016 Days In NF 80  
\* NF Contact Name JO NF CONTACT \* Phone 785.222.2222  
NF Comments

**Local Contact Agency (LCA)**

\* LCA Organization NORTH CENTRAL FLINT HILLS AAA (8)  
\* LCA Contact Date  
\* LCA Contact Person  
\* LCA Contact Phone  
\* Customer Chose To Explore Transition Options Yes  
Referrals as needed to: \* Ombudsman --select-- \* DRC --select-- \* Other --select--  
Date Referred to CM/CME  
CM/CME Name  
CM/CME Phone  
LCA Comments

**LCA Billing Document - Maximum 12 Units**

Meeting Length In Units (1 Unit = 15 Minutes)  
Coordination & Planning Time In Units  
LCA Billing In Units

**KDADS Follow-Up**

KDADS Follow-Up Date  
KDADS Follow-Up Notes TCM  
KDADS Follow-Up Notes DRC  
KDADS Follow-Up Notes OMB  
KDADS Follow-Up Notes Other  
Customer Transitioned  
Customer Declined  
Customer Contacted By TCM  
Customer No Action Referral

Continued on next page

## Accepting a CTO Referral / Completing the Local Contact Agency (LCA) Region, continued

### How To

*Continued*

Step	Action	Result						
2.	Change the Form Status of the worksheet	Choose one of these options:						
<table><tr><th>If...</th><th>Then...</th></tr><tr><td>Not working the case at this time</td><td>Choose <i>Form Status</i> '1<sup>st</sup> LCA ACCEPTED'</td></tr><tr><td>Working the case now</td><td>Choose <i>Form Status</i> 1<sup>st</sup> LCA WORKING CASE'</td></tr></table>			If...	Then...	Not working the case at this time	Choose <i>Form Status</i> '1 <sup>st</sup> LCA ACCEPTED'	Working the case now	Choose <i>Form Status</i> 1 <sup>st</sup> LCA WORKING CASE'
If...	Then...							
Not working the case at this time	Choose <i>Form Status</i> '1 <sup>st</sup> LCA ACCEPTED'							
Working the case now	Choose <i>Form Status</i> 1 <sup>st</sup> LCA WORKING CASE'							
3.	Click the <b>Apply Changes</b> button.	The form status change is saved.						
4.	Once the case is being worked, complete the worksheet's <b>Local Contact Agency (LCA)</b> fields.							
5.	<b>Apply Changes</b> to save any information prior to completing the worksheet.	Ensures changes won't be lost if exiting the worksheet before completion.						
6.	Continue with the next chapter on completing the <b>LCA Billing Document</b> .	The worksheet is not complete until the billing information is added.						



# LCA Billing Document

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## Introduction

The LCA completes the *LCA Billing Document – Maximum 12 Units* region. Use this region to record the length of time the LCA spent meeting with the customer, and the time spent coordinating and planning the meeting.

The time spent for each billing section is entered in units. Each unit is 15 minutes, and the maximum number of total units (meeting length + planning time) that can be entered is 12 (three hours.)

When the LCA portion of the worksheet is complete ('Local Contact Agency (LCA)' and 'LCA Billing Document' regions) the form status is changed to 'Completed by LCA' and the billing information is sent to KAMIS so the automated payment process can begin.

## How To

Follow the steps in the table below to enter the billing units and complete the worksheet.

Step	Action	Result								
1.	Enter the billings units as described below.	The billing units entered here are what populate the KAMIS Plan of Care for payment processing.								
	<table><tr><th>Field</th><th>Action / Purpose</th></tr><tr><td>Meeting Length in Units</td><td>Enter the number of 15-minute units spent on meeting with the customer.</td></tr><tr><td>Coordination &amp; Planning Time in Units</td><td>Enter the number of 15-minute units spent planning and coordinating the meeting.</td></tr><tr><td>LCA Billing in Units</td><td>This field is auto-calculated by adding the previous two entries.</td></tr></table>		Field	Action / Purpose	Meeting Length in Units	Enter the number of 15-minute units spent on meeting with the customer.	Coordination & Planning Time in Units	Enter the number of 15-minute units spent planning and coordinating the meeting.	LCA Billing in Units	This field is auto-calculated by adding the previous two entries.
Field	Action / Purpose									
Meeting Length in Units	Enter the number of 15-minute units spent on meeting with the customer.									
Coordination & Planning Time in Units	Enter the number of 15-minute units spent planning and coordinating the meeting.									
LCA Billing in Units	This field is auto-calculated by adding the previous two entries.									
2.	Click on the <b>Apply Changes</b> button to save the changes.									
3.	Review the worksheet, making sure all required fields are completed, and all information is accurate.	Once the worksheet is saved as complete, no changes can be made.								
4.	Change the Form Status to <b>COMPLETED BY LCA</b> and click on the <b>Apply Changes</b> button.	The worksheet is saved as complete, all fields are changed to read-only, and payment information is forwarded to KAMIS for authorization/processing by KDADS.								

## Worksheet Status

### Worksheet Status

Not all statuses are available to all organization types. However, all worksheet statuses can display in the Report listing on the CTO Report page, regardless of the logged-in user's organization type. The table below lists all worksheet statuses, which organizations will have the status available to select in the Form Status drop-down list, and the purpose of the status.

Status	Available To...	Purpose
Work In Progress	Adult Care Home	Initial status prior to the worksheet being created or while it is being completed by the Adult Care Home.
Referred to 1 <sup>st</sup> LCA	Adult Care Home	Adult Care Home has completed data entry of the worksheet and refers it to the LCA for action.
Discarded	All Organizations	If the Worksheet was started in error, or is determined to no longer be an active request, Discarded closes the referral without further action.
Stopped – By User – AAA Notified	All Organizations	Stops the referral of the worksheet. The user will need to contact the Area Agency on Aging (AAA) by phone regarding the reason for the status.
1 <sup>st</sup> LCA Accepted	1 <sup>st</sup> LCA	Indicates that the LCA has seen and accepts the referral.
1 <sup>st</sup> LCA Working Case	1 <sup>st</sup> LCA	Indicates that the LCA is actively working the case.
Completed by LCA	LCA	Indicates that the LCA portion of the case has been completed. Forwards the payment information into KAMIS. Refers the case to KDADS for payment authorization and processing.
Declined by LCA*	1 <sup>st</sup> LCA	On older worksheets still displaying a 1 <sup>st</sup> and 2 <sup>nd</sup> LCA, this indicated that a condition occurred where the 1 <sup>st</sup> LCA was unable to accept and work the case. Forwarded the case to the 2 <sup>nd</sup> LCA.
2 <sup>nd</sup> LCA Accepted*	2 <sup>nd</sup> LCA	On older worksheets still displaying a 1 <sup>st</sup> and 2 <sup>nd</sup> LCA, this indicated that the 2 <sup>nd</sup> LCA had seen and accepted the referral.
2 <sup>nd</sup> LCA Working Case*	2 <sup>nd</sup> LCA	On older worksheets still displaying a 1 <sup>st</sup> and 2 <sup>nd</sup> LCA, this indicated that the 2 <sup>nd</sup> LCA was actively working the case.
Referred to 2 <sup>nd</sup> LCA*	Automated	For older worksheets still displaying a 1 <sup>st</sup> and 2 <sup>nd</sup> LCA: System Automated. If 7 business days had passed since the referral date and the status was either "Declined" or "Referred to 1 <sup>st</sup> LCA", the system referred the case to the 2 <sup>nd</sup> LCA listed on the worksheet.

*Continued on next page*

## Worksheet Status, continued

### Worksheet Status *continued*

Status	Available To...	Purpose
Completed by KDOA/KDADS	KDADS	KDADS is the final step in the worksheet. This status closes the CTO process on this worksheet.
Stopped – Open POC	Automated	An active Plan of Care has been found in KAMIS. Contact the AAA for resolution.
Stopped – On Waiting List	Automated	<p>Once there is a worksheet entered with an indication that the customer is on a waiting list, any future worksheet referrals will be stopped.</p> <p>KDADS has the ability to release a customer's record if he/she should be removed from a waiting list or if the waiting lists are discontinued.</p>
Stopped – Open CTO	Automated	An open worksheet has been found. This would be a duplicate referral, which is not allowed, so the referral is stopped.
Time Limit Exceeded*	Automated	<p>For older worksheets still displaying a 1<sup>st</sup> and 2<sup>nd</sup> LCA: Indicated that the 1<sup>st</sup> LCA did not meet the time limitations and the case was referred to the 2<sup>nd</sup> LCA.</p> <p>This may have occurred for two reasons:</p> <ol style="list-style-type: none"> <li>1. LCA did not complete the worksheet within the 15 days.</li> <li>2. LCA did not change the status to 1<sup>st</sup> LCA Working Case.</li> </ol> <p>This status is displayed next to the 1<sup>st</sup> LCA's line on the worksheet.</p>

\*Due to changes in the CTO process that eliminated Centers for Independent Living as a Local Contact Authority (LCA), these statuses became obsolete. The CTO application was updated in December 2016 to remove the 2<sup>nd</sup> LCA statuses as a selectable option.


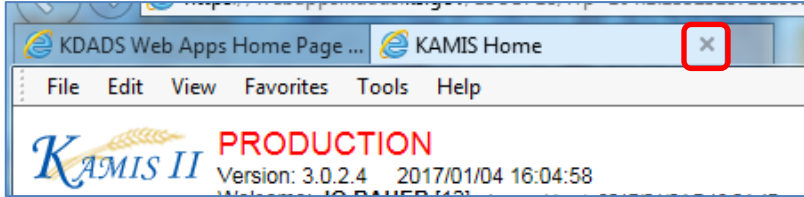
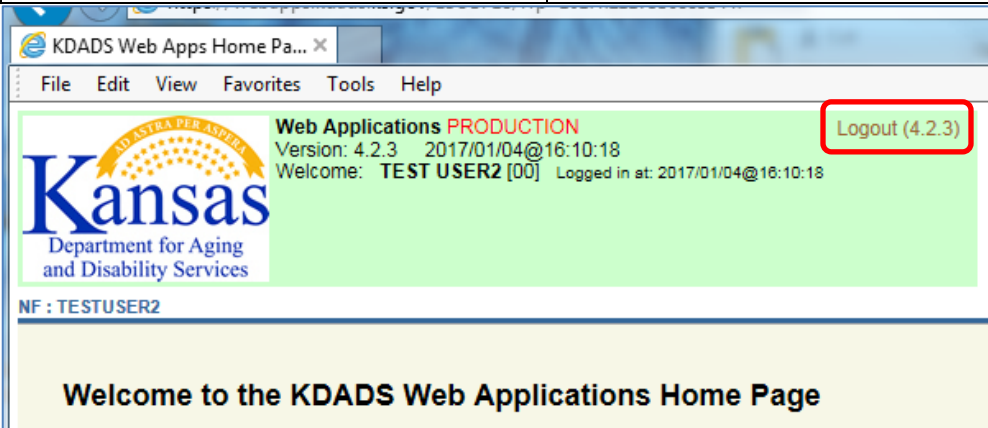
# Closing Applications and Logging Out

## Introduction

When you are done using CTO or any KDADS web application you have access to, you should close the application windows, and log out of the KDADS Web Applications Home Page to prevent unauthorized access to any KDADS web applications.

## How To

Follow the steps in the table below to log out of KDADS Web Applications.

Step	Action	Result
1.	Click on the internet browser tab for any open KDADS web app, such as CTO.	Makes the open application the active tab (or window.)
2.	Click on the 'X' on the tab to close the application.	The tabbed window closes.
 		
3.	Repeat steps 1-2 for any additional open KDADS web apps.	When all applications are closed, the KDADS Web Applications Home Page displays.
		
4.	Locate the <b>Logout</b> link at the top of the KDADS Web Applications Home Page.	
5.	Click on the <b>Logout</b> link.	The user is logged out of KDADS Web Applications and the login page displays.
6.	Close the web browser.	